



**SUPERIOR COURT OF CALIFORNIA,
COUNTY OF HUMBOLDT**

W. Bruce Watson
Presiding Judge

825 Fifth Street • Eureka, California 95501 • Room 222
Telephone 707-445-7256 • Fax 707-445-7630

KERRI L. KEENAN
Court Executive Officer

INVITATION FOR BIDS

- Date:** April 30, 2012
- IFB No:** 2012-01
- Regarding:** Civil Investigative Services
- Questions:** Questions to the Court should be directed to:
InvestigatorIFB@Humboldtcourt.ca.gov.
- Bids Due:** Friday May 25, 2012 no later than 4:30pm (PST)
- Submissions:** Bids must be submitted to:
Superior Court of California,
County of Humboldt
Attn: Shannon Walker, IFB No. 2012-01
825 Fifth Street, Room 224
Eureka, California 95501

1.0 BACKGROUND INFORMATION

1.1 *Investigative services for:*

- *Probate,*
- *Conservatorships &*
- *Guardianships*

consisting of the following types:

- *Conservatorship,*
- *After Appointment Conservatorship,*
- *Temporary Conservatorship,*
- *6-Month Review,*
- *Annual Review,*
- *Guardianship,*
- *Temporary Guardianship. and*
- *Step Parent Adoption,*

This includes, but is not limited to, successful completion of investigations and written reports as required by the court. Refer to Probate Code §1826 – Court Investigator for more information.

1.2 *Currently, civil investigations are conducted by two licensed private investigators that are under contract with the Court. They assign investigations and the corresponding reports between the two of them, independent of Court direction. These contracts expire on June 30, 2012.*

1.3 *In a typical month, the court requires approximately 25-35 total investigations. A bidder may bid for either:*

A) all civil investigations, or

B) an equitable share of investigations with another successful bidder.

1.4 *Humboldt operates within the court investigator reciprocity agreement between California counties.*

1.5 *Bidder must provide the court with their current Private Investigators License number. All licenses will be verified with the Department of Consumer Affairs Bureau of Security and Investigative Services*

1.6 *It is the intent of the Court to award a contract to one or two investigators where the court can set a uniform fee schedule for the listed investigations that is both equitable to the investigators and economical for the public.*

1.7 *For additional information about this solicitation, including electronic copies of the solicitation documents, see Humboldt Superior Courts website, www.humboldt.courts.ca.gov.*

2.0 DESCRIPTION OF SERVICES AND DELIVERABLES

The Court seeks services meeting the following specifications:

2.1 *The investigator provides neutral information about the case to the judge. All investigations and reports must conform to current statutes and requirements for the specific type of investigation being conducted. All investigations should*

conform generally with the guidelines listed below for conservatorship investigations, except where statute or necessity dictates otherwise.

- 2.2 *The investigator will conduct interviews with the proposed conservatee, all petitioners, proposed conservators, and relatives and provide a written report to the court as defined in Probate code §1826.*

The investigator will be expected to:

- 1. Have a private interview with the proposed conservatee.*
- 2. Inform the proposed conservatee how the conservatorship will affect them.*
- 3. Notify the proposed conservatee if he or she is able to attend the hearing and explain what will happen at the hearing.*
- 4. Explain to the proposed conservatee their right to object or oppose the conservatorship, to have a lawyer, have a different conservator, and to have a trial by jury if he or she wants a jury to decide if a conservator is needed.*
- 5. Determine whether the proposed conservatee wishes to be represented by legal counsel, if no legal counsel has been retained determine whether the proposed conservatee desires the court to appoint legal counsel.*
- 6. Write and submit to the court a confidential report regarding the investigation and send copies to all the necessary parties.*
- 7. Make recommendations to the Court.*

Following the appointment of the conservator the investigator stays involved on a limited basis. The investigator will perform a six month review to make sure the conservator is fulfilling his or her responsibilities. The investigator will perform another review of the case after another six months and then again each year after that.

- 2.3 *The investigator may also be asked to provide an additional written report and make recommendations to the court if:*
- 1. A petition for appointment of a temporary conservator is filled*
 - 2. The temporary conservator wants to move out of their place of residence*
 - 3. The conservator asks for exclusive authority to make medical decisions for the conservatee.*
 - 4. The conservator wants to sell the conservatee's home*
 - 5. A petition for appointment of a successor conservator is filled and the conservatee cannot attend, or refuses to attend the hearing on the petition.*
- 2.4 *Investigators will be required to submit monthly invoices to the Court fiscal office. These invoices must detail each investigation including case number, name of conservatee, name of conservator, name of attorney representing each party, type of investigation conducted, amount due for the investigation, and either court minutes or a court order approving or accepting the report of the investigation. These invoices are due by the 15th of the month following the month being invoiced.*

3.0 TIMELINE FOR THIS IFB

The Court has developed the following list of key events related to this IFB. All dates are subject to change at the discretion of the Court.

EVENT	DATE
IFB issued	<i>April 30, 2012</i>
Latest date and time bids may be submitted	<i>May 25, 2012 4:30 pm (PST)</i>
Bids received will be published on Court's website (<i>estimate only</i>)	<i>June 1, 2012, 10:00am (PST)</i>
Notice of Intent to Award (<i>estimate only</i>)	<i>June 8, 2012</i>
Execution of contract (<i>estimate only</i>)	<i>June 22, 2012</i>

4.0 IFB ATTACHMENTS

The following attachments are included as part of this IFB:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing IFBs (Non-IT Services)	These rules govern this solicitation.
Attachment 2: Court Standard Terms and Conditions	If selected, the person or entity submitting a bid ("Bidder") must sign a Court Standard Form agreement containing these terms and conditions (the "Terms and Conditions").
Attachment 3: Darfur Contracting Act Certification	If Bidder has had business activities or other operations outside of the United States within the previous three years, Bidder must complete the Darfur Contracting Act Certification and submit the completed certification with its bid.
<i>Attachment 4: Payee Data Record</i>	<i>Required when receiving payments from the Judicial Council of California, in lieu of an IRS W-9</i>

5.0 SUBMISSIONS OF BIDS

- 5.1 Bids should provide straightforward, concise information that satisfies the requirements of the “Bid Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the IFB’s instructions and requirements, and completeness and clarity of content.
- 5.2 The Bidder must submit its bid in two parts, the non-cost information and the cost information.
- a. The Bidder must submit **one (1) original and one (1) copy** of the non-cost information. The original must be signed by an authorized representative of the Bidder. The non-cost information (including all copies thereof) must be submitted to the Court in a single sealed envelope, separate from the cost information. The Bidder must write the IFB title and number on the outside of the sealed envelope.
 - b. The Bidder must submit **one (1) original and one (1) copy** of the cost information. The original must be signed by an authorized representative of the Bidder. The cost information (including all copies thereof) must be submitted to the Court in a single sealed envelope, separate from the non-cost information. The Bidder must write the IFB title and number on the outside of the sealed envelope.
- 5.3 Bids must be delivered by the date and time listed on the coversheet of this IFB to:
- Superior Court of California,
County of Humboldt
Finance Department
Attn: Shannon Walker, IFB No. 2012-01
825 Fifth Street
Eureka, CA 95501*
- 5.4 Late bids will not be accepted.
- 5.5 Only written bids will be accepted. Bids must be sent by registered or certified mail, courier service (e.g. FedEx), or delivered by hand. Bids may not be transmitted by fax or email.

6.0 BID CONTENTS

6.1 Non-Cost Information. The following must be included in the non-cost information. A bid lacking any of the following may be deemed non-responsive.

- a. Bidder's name, address, telephone and fax numbers, and federal tax identification number. Note that if Bidder is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.
- b. Bidder must clearly state whether bidder is bidding on all civil investigations or on an equitable share of civil investigations with another successful bidder.
- c. Acceptance of the Terms and Conditions.
 - i. Bidder must either indicate acceptance of the Terms and Conditions or clearly identify exceptions to the Terms and Conditions. An "exception" includes any addition, deletion, qualification, limitation, or other change.
 - ii. If exceptions are identified, the Bidder must also submit a red-lined version of the Terms and Conditions that clearly tracks proposed changes, and a written explanation or rationale for each exception and/or proposed change.
 - iii. **Note: A material exception to the Terms and Conditions will render a bid non-responsive.**
- d. Certifications, Attachments, and other requirements.
 - i. Bidder must include the following certification in its bid:

Bidder has no interest that would constitute a conflict of interest under California Public Contract Code sections 10365.5, 10410 or 10411; Government Code sections 1090 et seq. or 87100 et seq.; or rule 10.103 or rule 10.104 of the California Rules of Court, which restrict employees and former employees from contracting with judicial branch entities.
 - ii. If Bidder has had business activities or other operations outside of the United States within the previous three years, Bidder must complete the Darfur Contracting Act Certification (Attachment 4) and submit the completed certification with its bid.
 - iii. If Bidder is a corporation, proof that Bidder is in good standing and qualified to conduct business in California.
 - iv. Proof of financial solvency or stability (e.g., balance sheets and income statements).

- v. Current Private Investigator License number
- vi. Proof of insurance acceptable under attached Standard Terms and Conditions.
- vii. Bidder must have a minimum of three (3) years experience in court investigations, social work, or related fields.

6.2 Cost Information. The following must be included in the cost information.

- a. Bidder's name, address, telephone and fax numbers, and professional license number.*
- b. Listing of all investigation types and corresponding total cost for each type.*
- c. Time frame of services (i.e. July 1, 2012 through June 30, 2014).*
- d. Signature of authorized representative of the bidder and date of signature.*

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a "loss leader" as defined in Section 17030 of the Business and Professions Code.

7.0 OFFER PERIOD

A Bidder's bid is an irrevocable offer for thirty (30) days following the bid due date. In the event a final contract has not been awarded within this period, the Court reserves the right to negotiate extensions to this period.

8.0 EVALUATION OF BIDS

The bids received from responsible bidders will be published on the Court's website on June 1, 2012, 10:00 a.m. at www.humboldt.courts.ca.gov.

The Court will evaluate the bids as described in the Administrative Rules. Award, if made, will be to the lowest responsible bidder meeting specifications. To be deemed a responsible bidder, bidder must meet all the certifications and requirements above, agree to abide by the Judicial Branch Code of Ethics, and the Court must be satisfied the bidder will provide competent investigative services.

The Court may conduct interviews with Bidders to clarify aspects of their bids. The interviews may be conducted in person or by phone. If conducted in person, interviews

will likely be held at the Court's offices. The Court will not reimburse Bidders for any costs incurred in traveling to or from the interview location. The Court will notify eligible Bidders regarding interview arrangements.

9.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

One copy of each bid will be retained by the Court for official files and will become a public record. California judicial branch entities are subject to rule 10.500 of the California Rule of Court, which governs public access to judicial administrative records (see www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500).

If information submitted in a bid contains material noted or marked as confidential and/or proprietary that, in the Court's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed upon a request for access to such records. If the Court finds or reasonably believes that the material so marked is **not** exempt from disclosure, the Court will disclose the information regardless of the marking or notation seeking confidential treatment.

10.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS

The Court has waived the inclusion of DVBE participation in this solicitation.

11.0 PROTESTS

Any solicitation protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Bidder to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. The deadline for the Court to receive a solicitation specifications protest is Monday May 14, 2012 at 5:00 pm (PST). The deadline for the Court to receive post-award protests is Wednesday June 13, 2012 at 5:00 pm (PST). Protests should be sent to:

*Superior Court of California,
County of Humboldt
Finance Department
Attn: Drew Lund, IFB No. 2012-01
825 Fifth Street
Eureka, CA 95501*